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***See separate Resolved Issues document**

Highlighted entries will be moved to the resolved issues list July 1, 2001

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
18	<p>For end use customer billing (dual billing situation), ACC Rules are not specific about what the utility and ESPs are obligated to show on their bills.</p> <p>ESP</p>	02/02/00	Billing			<p>02/02/00 In many markets (CA specifically) begin and end meter reads need not be displayed on a bill. In Arizona market, utilities are required to show specific pieces of information but it's unclear if ESPs are required to follow same rules.</p> <p>This could apply to all revenue cycle services.</p> <p>02/24/00 (ACC - Bill Rigsby) reported on ACC Rules, refer to sections R14-2-210B-2 and R14-2-1612. Verbiage states that ALL bills must contain the data elements referred to in these sections. UDCs would be required to show a generation line item on their bill (dual billing) showing a zero amount due. Additionally, ESP would be required to show a CTC charge on their portion of the bill with a zero amount due.</p> <p><u>Action:</u> ESPs/UDCs create a proposal for short term solution which may require filing for waiver to the Rules as a short term solution. All parties to come up with possible long-term changes to the Rules.</p> <p>Issue for MRSPs: Begin and end reads must be printed on bill according to the Rules. So, these must be passed to the billing parties.</p> <p>03/08/00 Should a Rule change be suggested as a short-term solution. It is possible to put this in a combined waiver of issues that need to be changed in the Rules. A long term solution would be actually to change the verbiage.</p> <p><u>Action:</u> ESPs and UDCs should come prepared with their company's position in regards to filing waivers. Group will come up with proposal about how this issue should be resolved.</p> <p>03/14/00 Decision to have a separate waiver filed for this issue (separate from #28,36, & 56).</p>	1	Open

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						<p>03/22/00 Proposal: Bill party needs to itemize the bill components to allow customer to break down/re-calculate the bill.</p> <p>10/11/00 – October 4, 2000 Rule tweaking package approved – 1612 changed but not 210 B2. 210 B2 DOES need to be chngd. Shirley will let Barbara Keene know and wait for direction from Staff on how to handle the existing waiver.</p> <p>2/21/01 Barbara Keene had advised the group at a previous meeting that the PSWG might need to submit a new waiver with documentation to support the waiver.</p>		
25	What specific VEE rules should utilities use on an ongoing basis to verify and bill off of incoming MRSP reads. (PSWG – Billing)	01/26/00	Meter-VEE		See issue 101	<p>01/26/00 Since MRSPs use different algorithms, it's difficult for utilities to determine if MRSPs are performing VEE on an ongoing basis. If utilities use their own VEE systems to verify reads it may cause invalid rejections.</p> <p>02/01/00 What is the utilities responsibility to audit MRSPs? Rules state this certification must take place yearly.</p> <p>04/27/00 A sub/subgroup was formed to review existing VEE rules, develop objectives, changes and proposals (if needed), develop performance measures and monitoring criteria. TEP - Tony Gilly, APSES, New West Energy - Janie Mollon, C3 Comm, CSC, APS, SRP - Greg Carrel, a representative from the Co-ops (possibly Barry Scott), and possibly First Point. Renee Castillo volunteered to chair this sub/subgroup and will set up a meeting with these participants.</p> <p>06/22/00 Reassigned from Policy to Metering subcommittee 10/11/00 – This has previously been assigned to VEE 2/21/01 – This issue will be addressed in the MRSP performance monitoring task team with issue 101.</p>		Open
30	Do we need to prioritize transactions by importance	01/27/00	Remittance	02/08/00		Example, SRP requires acknowledgement both incoming and outgoing within 24 hours.		Open

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	due to financial considerations and customer service (for problem resolution and cycle time of EDI 824)?					All subcommittees need to define transaction cycle time.		
31	Is there a need to standardize dual path or single path when handling the 820? Do we provide a remittance advice directly to ESP and payment directly to bank (dual path)? OR do both documents go directly to bank (single path)?	01/27/00	Remittance	02/08/00		<p>Payments go to bank and details go to provider. Since most banks are currently using VANS, sending both transactions may be costly to sending parties.</p> <p>2/21/01 –TEP & SRP use a dual path, APS uses a single path. This issue will be discussed more if the future.</p>		Open
38	Will UDCs allow ESPs to interrogate meters on non-DA customers for load research purposes/ billing option purposes? (PSWG – Metering)	01/27/00	Policy			<p>(New West Energy - Janie) will clarify at 03/13/00 meeting.</p> <p>Details on Issue: Customer is not DA and wants load research data for informational purposes.</p> <p>Example: ESP may be taking multiple customer accounts but not all of them. ESP would like a secondary password to review this information so they can provide information of all sites (even those not going DA) to customer. If there is no IDR meter at site, customer would need to initiate an IDR meter from UDC and pay associated costs.</p>	3	Open
41	Who is responsible for validating that a meter can be read after a MSP has set a new meter? "Day of Install" (Day of Removal, issue 103)	01/27/00	Meter-VEE			<p>In CA, it's a requirement from CPUC (Rule 22), the ESP is responsible for ensuring newly installed meter can be read prior to 1st billing by MRSP or face penalties.</p> <p>02/03/00 (First Point) This is usually done at the meter install time.</p> <p>04/27/00 To be addressed in the VEE sub/subgroup. 2/7/01 – the group clarified that this issue involves both the MSP</p>	3	Open

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						<p>and the MRSP</p> <p>3/21/01 The group agreed that a separate Task Team is required to develop the Day of Install and Day of Removal Process covering both MSP and MRSP responsibility. The Task Team will make a recommendation on where the process will reside (i.e. VEE doc, Metering Handbook etc). The group agreed to allow the MRSP or MSP Performance Task Team (whoever finishes first) to complete the Performance Monitoring document until they are ready to look at Day of Install/Day of Removal. At that time, the MRSP Performance Task Team will be put on hold while the Day of Install/Day of Removal task Team is established to complete the process. Once this process is complete, the MRSP Performance Task Team will re-group to develop the Performance monitoring criteria around Day of Install/Day of Removal. The MSP Performance Monitoring Task Team will also incorporate into their Performance Monitoring into their document.</p>		
42	Will we require an 824 on all transactions (accepted or take exception to a data element). Do we only want to get an 824 when there's a problem with data? (PSWG - Policy)	02/01/00	Remittance					Open
47	Standardization of Billing Options (ESP and UDC consolidated billing as well as Dual billing) from all UDCs should be implemented immediately to provide customer choice. Include related changes or impacts to other processes or procedures. (APSES)	01/25/00	Policy			<p>A working group of market participants should study the intent of Commission Rules and make a determination that applies to all UDCs. Terms and Conditions for credit, payments and partial payments, and other billing processes should be standardized for all UDCs. During the direct access rulemaking process, an earlier working group discussed whether billing options should be discretionary, but no consistent position was reached. Market participants need to clarify the procedures for consistency among UDCs.</p> <p>In order to develop a viable direct access market, the limitations on customer choice caused by differences in billing procedures among UDCs will be removed. Customer confusion and criticism</p>	2	Open

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						will be reduced, and ESPs will have flexibility to meet individual customer needs.		
49	<p>Develop interim business processes that can be implemented manually, and plan mapping for both out-bound (UDC to ESP) and in-bound (ESP to UDC) DASRs for the following communications. Business processes should be implemented immediately by each UDC with as much consistency as possible, and EDI mapping can be phased in.</p> <p>Customer Moving: - Notification of direct access customer moving to new address within the same distribution company territory without having to return to bundled service. (APSES)</p>	01/25/00	DASR			Customers need the flexibility to contact either their ESP or UDC to implement a request, as provided by proposed business processes. The customer's choice and other information can be communicated by e-mail or fax until out-bound/ in-bound DASRs are functional. Customers will not be burdened with having to make numerous phone calls to UDCs and ESPs to implement their service choice. To develop a viable direct access market, the burdens and costs caused by unnecessary switches to/from bundled service will be removed. "Customer choice" will become more of a reality.		Open
50	New Customer - Same Facility: - A new customer takes over an existing direct access facility, keeps same ESP and meter without returning to bundled service. (APSES)	01/25/00	DASR			see Issue 49, Description, paragraph 1		Open
51	Account Update – Notification of changed account information. UC and PD DASRs appear to be both	01/25/00	DASR			see Issue 49, Description, paragraph 1		Open

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	in/out-bound in the Arizona DASR Handbook (APSES)							
52	UDCs and market participants need a clearly-defined communication process for promptly communicating and resolving problems with data, meters, or bills among ESPs, MSPs, MRSPs, and UDCs (APSES)	01/25/00	Policy		see Issue 34	<p>Process should be initiated by any participant to establish communication to solve problem within a defined time frame, if possible, and, if necessary, to maintain communication until root cause analysis is complete. Standardized process should be implemented immediately by each participant and automated by all parties as soon as possible.</p> <p>An example of the California "MADEN" process is attached to the original change control document.</p> <p>Process will reduce meter and data errors that cause billing errors and delays in billing and receiving revenue. It will help provide customer satisfaction by reducing billing questions and complaints to both UDCs and ESPs.</p>	3	Open
55	UDC fees for Direct Access services (CISR, DASR, metering, meter reading, billing, settlement, etc.) are too high and not consistent between UDCs. (APSES)	01/25/00	Policy		4/18/01	<p>The 3 largest UDCs have proposed varying fees for Direct Access services, such as: meter information, submitting Direct Access Service Requests, meter installations or removals, meter reading services, consolidated and/or dual billing, and settlement billing. These fees are, in some cases, excessively high and do not reflect the true marginal cost of providing these services. Many fees are required by one UDC, but not at all by other UDCs. Even when required by all UDCs for same service, fees are not consistent and vary quite substantially. All the various fees provide an additional barrier to development of a competitive market in Arizona.</p> <p>Proposal To develop a viable market in Arizona, a group consisting of market participants should be tasked with determining which fees should be mandatory, which fees should be discretionary, and which fees should be deferred until the market has developed. This group should also recommend which costs could be recovered as part of base rates and which should be recovered in service fees. Finally, the group should recommend a consis-</p>	2	Resolved

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						<p>tent, cost-based methodology for calculating the costs to be re-covered by the UDCs.</p> <p>4/18/01 Participants agreed to close the issue, because as Jim Wontor (APSES) suggested, PSWG is not the appropriate place to pursue these issues.</p>		
59	Need clarification on estimating rules, specifically section 210-A-5C	02/08/00	Policy			<p>Confusion about load profiled customer or customers needing load data. Does this have anything to do with real time pricing?</p> <p>10/12/00 210 A5c The group believe this issue is for 210 A5 c only. Need to determine if it should be a part of our 210 ...waiver Action Item: Shirley will seek clarification with Staff 10/26/00 210 A5c - per Barbara keene this is a DA cust that isn't load profiled 11/01/00 Assigned to Policy</p>	3	Open
60	According to the Rules, a third party can be back billed up to 12 months. What will the process be for back-billing third parties? (R14-21-E3)	02/08/00	Billing			<p>*Refer to Issue 70</p> <p>05/02/01 This issue was earlier identified as a "quick hitter", one that could easily be resolved, however at this meeting the group discussed the issue and determined that this is not a quick hitter. This is a process requiring a task team with scenarios covering different billing options, what happens when a customer switches ESPs one or more times. Other questions include: What happens if the third party to bill is no longer in business? What information is placed on the bill and whom do you send the bill to?</p>	2	Open
61	Who is responsible for tracking the performance of MSP and MRSP's? What is the performance criteria What is process for communicating this information? (PSWG – Billing)	02/08/00	Metering		see Issue 65	<p>06/22/00 Discussion also focused on possible timelines and CUBR has performance standards. Reassigned from Policy to Metering.</p> <p>0720/00 Issue should refer only to MSPs. (TEP) Position on MSP Performance Standards was provided. 2/7/01 – the group confirmed that this issue deals with developing performance monitoring /testing criteria for MSPs</p> <p>2/07/01 – established a task team to develop – John Wallace – Chair due date 4-01</p>	3	Open

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						<p>3/7/01 The group reviewed and made recommendation to the status report. Additional task team meetings are required.</p> <p>3/21/01 John Wallace (GCSECA) reported that the next Task Team meeting is set for April 13th at New West Energy.</p> <p>04/04/01 John Wallace (GCSECA) reported that the next Task Team meeting is now scheduled for April 17th (the 13th is a holiday) at Grand Canyon State Electric Cooperative building.</p> <p>04/18/01 John Wallace (GCSECA) reported on the status of the task team. The conclusion of the April 17 meeting was to disband until other processes are completed in order to have processes to monitor. Janie Mollon would like to see work continue to be a model for other states and to improve customer relationships, and reduce any negative impact to customers. Stacy Aguayo would like to see safety issues covered, as safety is a high priority. Jenine Schenk reported that the entire safety field hasn't been discussed in the metering task teams, or defined in the metering handbook. PSWG recommended the group disband at this point, however reserve time on 5/2/01 and discuss which issues are causing problems in measuring, or what items can be measured. Once issues are identified the group can determine when the MSP Performance Task Team can begin meeting again.</p> <p>05/02/01 The group brainstormed ideas/concepts on what criteria to monitor Meter Service Providers. TEP submitted a proposal for MSP performance monitoring. Stacy (APS): Does it make sense to create a PM packet based on current standards and then update and change the document and standards as they change in the future? Safety is a primary concern for APS and is a priority item to monitor. An example of safety criteria: How well did an MSP install that equipment/meter. TEP feels we need to get something down now, going over current</p>		

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						<p>documents. Timeliness of document submittal is a good item to track; safety hasn't been covered in PSWG so it TEP realizes it is more difficult to track.</p> <p>Jenine (APS) and June Greenrock (SRP) still find that it is hard to track the documents and what qualifies as a problem/event. The flow of documents for MSP is a more manual process (as compared to the MRSP process) so tracking is a concern/burden to the entities.</p> <p>The group came to a consensus that at a high-level performance monitoring can be done and the task team should meet again. The MSP task team has been assigned to review the ACC CC&N, Business rule Comparison / Proposed Arizona Best Practices, and the Metering Form Packet and come up with high level processes (areas) and which documents should be used to monitor MSPs. At this point, thresholds to establish decertification and warning letters should NOT be done</p> <p>An item to keep in mind for future meeting: Performance monitoring tracking for the monthly PMR may be based on a percentage of errors of errors on transactions with that MSP on a daily basis. (Example: 25 transactions on Monday with 5 errors is a 20% error for the day).</p> <p>Action Item: The task team will present a draft document at the July 11 meeting documenting at a fairly high level what will be monitored and how it will be monitored.</p>		
71	If after receiving an RQ DASR and UDC is planning to disconnect for non-payment or turn off a customer prior to switch, what is process to notify ESP that customer will be disconnected. (PSWG – Billing)	02/24/00	Metering		05/16/01 See issue 117	<p>This particular issue focuses more on how the metering side is handled when this type of issue arises. How to stop the meter exchange process.</p> <p>04/27/00 Will be reviewed when additional business processes are reviewed.</p> <p>05/02/01 he group discussed the issue for one hour prior to making a recommendation. The group agreed to send reject the DASR in this scenario with the appropriate reason code. Issue is resolved.</p> <p>TEP: DASR would be rejected if customer were delinquent. The comments field would state the reason why the DASR was re-</p>	3	OPEN

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						<p>jected.</p> <p>APS: Customer would still be allowed to go DA if they were behind in payments. ESP will be notified, but no formal process has been set up.</p> <p>SRP: Its an internal process, but it would reject DASR and figure out the meter issue</p> <p>CUC: Citizens would contact the ESP by fax or e-mail of scheduled disconnect date. If the customer is disconnected, then Citizens would send a TS DASR. However, it was noted a TS DASR may only be sent by the UDC when 1) the ESP is de-certified or 2) when the UDC receives a RQ DASR from another ESP. Citizens will agree to reject the DASR</p> <p>This issue only covers the instance where an RQ DASR is sent prior to a switch. What happens AFTER a customer has switched to DA? A new issue (#117) was added to the master issues log to address this issue.</p> <p>5/16/01 ISSUE WAS RE-OPENED as Citizens CANNOT reject the RQ DASR. The issue will remain open until Citizens can present a position paper.</p>		
75	On incoming DASR – only kWh meter number is required. State DASR handbook does not accommodate a kWh meter and Kvar meters, or other metering combinations. (PSWG – metering)	03/16/00	DASR		05/02/01 see issue 116	<p>04/18/01</p> <p>The group discussed the issue, and it was thought that it was understood to send one DASR per service delivery point, regardless of the number of meters at the service point.</p> <p>The EMI will indicate if there is more than one meter at the site. Janet Henry (AXON) says an MSP that gets an EMI indicating kVAR meter is required, an MSP will install one meter that reads both kWh and KVAR. Typically the MSP will leave the mechanical UDC kVAR meter wired and operating. UDC will have to remove their kVAR meter, or require a site meet.</p> <p>SRP and APS: Require one DASR for kWh meter only -not two DASRs. Action Item: Confirm how the UDCs (TEP and CUC) want the DASR's submitted when there are multiple meters at a site.</p> <p>05/02/01 TEP wants one DASR for kWh meter (per service delivery point).</p>		Resolved

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						<p>If KVAR meter is required, then that meter would be replaced with one meter that can meter both kVAR and kWh. If the kVAR meter is to be removed, TEP would remove it prior to the MSP installation.</p> <p>Citizens concurs with APS and SRP that one DASR should be sent in the case where there is both a kWh meter and kVAR meter.</p> <p>The group agreed to close issue 75 as resolved, the DASR should be sent under the kWh meter number. However, other meter combinations including totalized meters and accounts with both metered and unmetered services needs to be addressed. Issue 116 was added to the issues list to address these additional issues.</p>		
76	On DASR – forecasted meter owner is a required field. Is this appropriate? Should this be taken off of the RQ DASR? (PSWG -Metering)	03/16/00	DASR		05/02/01	<p>In step 3 of Metering Business processes, the pending meter owner is also required. Meter owner may change from the time the DASR is submitted to the time the meter is exchanged.</p> <p>05/02/01 The group discussed the issue and agreed this field is required; the EMI process depends on receiving this information from the DASR. Issue is resolved.</p>		Resolved
78	There is no language in Rules preventing MSP from contracting directly with customers, how should this issue be addressed?	03/28/00	Policy	08/07/00		<p>System implications – Will MSP have to submit DASR's?</p> <p>Rule change suggestion: Change the definition in Section R14-2-1601 "DASR means a form that contains all necessary billing and metering information to allow customers to switch electric service providers. This form must be submitted to the Utility Distribution Company <i>by the customer's Electric Service Provider load serving entity.</i>"</p> <p>This may force UDCs to create contracts for MSPs. ESP would send DASR but they would not be liable for MSP. Contract would allow UDC to hold MSP liable.</p> <p><u>Action:</u> All participants to assess impacts of MSP contracting directly with customer. Be prepared to discuss your company's position and provide solutions to this issue at the next meeting.</p>	1	Open

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						<p>05/09/00 (TEP) agrees there is no language in rules that precludes customer contracting directly with MSP. TEP would like to see language added to rules that would not allow a customer to contract directly with an MSP. (APS) identified contractual and system impacts if customer contracts directly with MSP. Systems and processes were developed to transmit DASR directly with ESP only. (APSES) leans towards customer not subcontracting directly with MSP. MSPs should work through ESP so customer doesn't end up with a metering system ESP or MRSP cannot read.</p> <p>06/22/00 To be reviewed by ACC staff. Is this within the purview of PSWG? <u>Action:</u> (due 06/30) Participants to submit position papers per 06/22/00 minutes.</p> <p>07/04/00 (Marv Buck) provided an overview of how other states are handling. Participants (NWE, APS, TEP, Phaser, SRP, APSES) presented their positions in a consolidated document to the PSWG.</p> <p>07/20/00 Steve Olea presented ACC staff position: Electric Competition rules allow MSPs to contract directly with customers; operating procedures need to be developed. Issue will include only MSPs at this time, but MRSPs will be kept on radar screen. <u>Action:</u> Participants may submit issue sheets, including 1) impact of issue on business processes and 2) any past practices in markets that provide insight to edryer@tucsonelectric.com by 08/07/00.</p>		
80	What are the security and encryption standards that will be used in transmitting data (Barry Scott).	05/09/00	Policy			06/22/00 Priority set at 1.	1	Open
81	What information is provided on a CISR from each UDC and is that information consistent (Jim Wontor –APSES)	05/09/00	DASR		04/18/01	<p>06/22/00 Priority set at 3.</p> <p>04/18/01 Participants agreed to close the issue, because as Jim Wontor</p>		Resolved

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						(APSES) suggested, PSWG is not the appropriate place to pursue these issues.		
83	When customer switches from DA back to SO or ESP to ESP and the MRSP has not provided meter read data (or estimated reads) for previous months, what should the UDC/ESP do to retrieve missing data? How can the final bill get trued-up? Should the UDC/ESP be allowed to estimate the final bill?	06/22/00	Metering		4/18/01 see Issue 65, 59, 60, 70, 83, 84, 101	06/22/00 <u>Action</u> : Each entity to provide their solutions on how to handle this issue in July subcommittee meeting. 07/20/00 (APS) discussed MRSP Performance Standards at the PSWG mtg. (TEP) Position on MRSP Performance Standards was provided. 08/16/00 Billing Subgroup is currently addressing. 04/18/01 The first part of this issue is covered in the MRSP Performance Monitoring issue 101. <u>When customer switches from DA back to SO or ESP to ESP and the MRSP has not provided meter read data (or estimated reads) for previous months, what should the UDC/ESP do to retrieve missing data?</u> If the file is posted as an exception, the second month without data makes the MRSP out of compliance. How can the final bill be trued up? This issue is resolved, part is to be covered in performance monitoring, issue 101 and the other two parts of this issue have been covered elsewhere and resolved.	1	Resolved
84 84 cont	Is the bill that is issued when a customer switches considered a "final" bill?	07/19/00	Billing			9/28/00 Staff confirmed that the when a customer switches providers or disconnect service, it is a "Final Bill". 10/12/00 The group agreed that R14-2-210 A5b should be addressed/modified with the next Rule Tweaking Package - Waiver not needed at this time. Will raise at Policy Group Nov 1 10/26/00 this issue covers all of section 5 not just 5b, will raise at Nov 1 Policy mtng 2/21/01 – the group agreed that this is resolved because Staff confirmed at a prior meeting that the bill is considered a Final Bill when the customer switches providers. Staff confirmed that by New West Energy's definition of "Customer", that one service		Open

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						<p>point closure would not be a Final Bill. Barbara Keene disagreed and will follow up with Staff and report at the March 7, 2001 meeting before status is updated.</p> <p>3/7/01 – Staff needs additional time – will report at the 3/21/01 meeting</p> <p>3/21/01 - Barbara Keene communicated that Staff is still working on the issue. Staff is looking for feedback from the Participants on how their positions in an effort to help direct Staff on this decision.</p> <p>The group confirmed that there are 2 issues that need to be addressed...</p> <ol style="list-style-type: none"> 1. What is the definition of a Final Bill and Customer 2. Rules prohibiting estimation of Direct Access Bills and Final Bills – Need flexibility for situations where it is impossible to obtain reads (i.e. damaged meter etc.). <p>Barbara will report back at the 4-4-01 meeting. Deferred to 4/18.</p> <p>4/18/01 Report from Barbara The ESPs are correct in how they use the term “customer” (see example), and the UDC’s may use the same definition. The customer is defined as whom the bill is issued to. EX: If there are 50 Walgreens, and the UDC bills to one entity for all 50 stores, then there would not be a final bill if one Walgreens chose another generation provider. This does not eliminate the conflict when the bill is sent to each individual store, and that one store chooses another provider.</p> <p>Two waivers are needed to resolve the issue: 1. Waiver to have the ability estimate final bill, 2. Waiver to have the ability to estimate usage for a DA customer requiring load data. In the waiver, it must be indicated how the rules should be re-written.</p> <p>Action Item: A joint waiver was suggested to resolve these issues. Judy Taylor (TEP) will bring a draft waiver for “estimating the final bill”. Judy will also look into creating the waiver for estimating usage of a DA</p>		

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						<p>customer, based on the “final bill” waiver for the May 2nd meeting. Action Item: Participants to contact their people to determine if each company is comfortable in supporting the joint waiver.</p> <p>05/02/01</p> <p>Judy Taylor (TEP) presented draft waivers for the Final Bill and estimating usage for load profiled customers.</p> <p>John Wallace (GSECA) suggested re-arranging some of the text. This document appears to be more of a rule change request than a true waiver. A waiver is needed to get immediate relief from the inability to estimate. A second document proposing new language for the rules and citing examples why estimation may occur in the waiver may be a better route to pursue.</p> <p>Barbara Keene (Staff) indicated that a rule change could take years. She suggest that it may be better include rule changes in a separate document, but still attach to the Waiver. Is this waiver two separate documents, or one document (waiver) with an attachment (rule tweaking)? Barbara will check which documentation is preferred (one or two documents).</p> <p><u>ACTION ITEM:</u> Judy Taylor will revise the Waivers, separating the rule language from the waivers seeking relief from the current rules. She will confirm with Barbara (Staff) that two separate documents are appropriate. New drafts will be passed out at the 5/16 meeting.</p>		
85	Grandfathering totalization of meters.	07/20/00	Policy			issue statement unclear		Open
87	Should a customer (w/out a UDC contract) be required to secure a new provider w/in 60 days after returning to Standard Offer?	10/04/00	Policy			APS' Schedule #1 section 3.5 has this requirement		Open
92	How do UDCs handle a customer requested disconnect for UDC or ESP? How do we differentiate	9/13/00				<p>10/11/00 Issue raised by Janie Mollon (NEW) in the metering group – referred to Policy to assign to the appropriate group. – TEP, APS, SRP, AZ Cooperatives</p> <p>Refer the customer to the ESP for DASR submittal to the</p>		Open

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	between a DA customer and Bundled customer? What type of training?					UDC. Once the DASR is received the UDC will initiate the orders to disconnect the service.		
94	What is the timeframe for UDC to exchange the meters to return direct access customers to bundled service	10/25/00	Metering			<p>ESPs want a required timeframe for UDCs to complete the exchange and ret cust to Bundled serv.</p> <p>10/11/00 New West Energy proposed a 10 working day from the DASR requirement.. UDCs to review and comment at next meeting</p> <p>10/25/00 The group discussed the issue and agreed to table it until Staff confirms if Standard Offer cust can own meters or not.</p> <p>11/29/00 – UDC processes have been documented in the Business Rule document. Will address this issue once the market is more established.</p> <p>4/18/01</p> <p>The time frame is: if the DASR is submitted 15 days prior to the read date, the meter change will occur on the read date. If not, the meter change will occur on the next read date. As stated by rule : R14-2-1612-J</p> <p>This issue is deferred until the market demands this item be addressed</p>	2	Open
95	What is the start read for a new meter sets	10/25/00	Metering			<p>10/25/00 Do meter set have to start at zero? Action item: participants will come back to November mtng with positions</p> <p>11/29-00 – SRP, TEP, APS require DA meters to be set at zero and CUC & SSVEC do not require reads at zero. Pending feedback from other Cooperatives</p>	1	Open
97	D-Star is requiring 10 minute intervals for imbalance settlement,	11/1/00	Policy			<p>11/1/00 FERC is requiring this by 12-15-01 – Unsure on when the PSWG should start addressing this.</p> <p>CA went to 10-min intervals on 8-1-00 and are doing in line interpolation.</p>		Open
99	The use of Electronic Signatures for DA transactions (House Bill 2069)	11/15/00	Policy			<p>11/15/00 The metering group requires a signature for the exch of the EPA form. Since metering is not the only group that this may apply to, it is passed to Policy and will be raised on 12-4-00.</p> <p>2/21/01 – The group added that any request for data would also</p>		Open

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						require a signature.		
100	What process can be developed to facilitate a customer installing an IDR meter and equipment before DA that allows a customer to move to DA and back with the same equipment.	12/4/00	Policy		4/18/01	<p>12/4/00 Action Item: Participants to draft position papers identifying options and send to Evelyn Dryer by January 24, 2001. Evelyn will consolidate position papers and send out prior to the February 7, 2001 meeting.</p> <p>3/7/01 – CUC LeeAnn Torkelson (R.W. Beck/Citizens) provided a handout (attached) and reported that CUC will be willing to purchase DA IDR meters when a customer is returning to Standard Offer. The only requirement is the meter must meet their meter standards. Currently, CUC has a load requirement for Commercial Standard Offer customers where an IDR meter is required. Residential Standard Offer customers are not eligible for IDR metering.</p> <p>Action Item: LeeAnn will report the actual load requirement for Standard Offer customers at the March 21st meeting. Also, if CUC would be willing to sell the CUC Standard Offer IDR meters to the customer when the customer has opted for Direct Access service.</p> <p>SRP provided a handout and reported that SRP will install an IDR meter at a customer's request while they are standard offer. Fees relative to this request were unknown and will be clarified at the March 21st meeting. SRP will not transfer equipment ownership or sell meter equipment. If SRP remains the MSP for customers opting for Direct Access service, the SRP IDR meter may stay in place while the customer is a DA customer and can be used for Standard Offer services if the customer returns. If the customer opting for DA services selects a third party MSP other than SRP, the SRP IDR meter must be removed and replaced with a customer, ESP or MSP owned IDR meter.</p> <p>Action Item: SRP to confirm fees associated with the installation of an IDR meter for a Standard Offer customer at the 3-21-01 mtng.</p> <p>TEP and Cooperatives were not ready to report. Will report at the March 21, 2001 meeting.</p> <p>APS presented their current process for transferring ownership of the meter to allow a customer to switch between standard offer and DA with the same meter at a previous meeting</p>	1	Resolved

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						<p>3/21/01</p> <p>Evelyn Dryer (TEP) reported on TEP' proposal (attached). TEP will agree to transfer ownership of a meter to the customer/service provider when going DA for average book value for the class and IDR type of the meter being transferred. And allow the meter to be transferred back to TEP when the customer returns to Standard Offer, TEP will pay the utility's average net book value adjusted for the passage of time for the class of meter being transferred plus administrative and service establishment charges. The depreciation will be rounded to the next highest year in the determination of the net book value at which the utility/UDC repurchases the meter from the customer/service provider.</p> <p>John Wallace (GCECA) reported on the Cooperative proposal (attached). The Cooperatives reported that they are not able to accommodate issue 100 for several reasons:</p> <ol style="list-style-type: none"> 1. With the exception to Navopache, the Cooperative territories are not open 2. Significantly higher costs of purchasing, interrogating and maintaining IDR meters that are not being recovered through current rates 3. Would be required to hire and train additional meter personnel to program, interrogate and maintain IDR meters 4. Currently, no way to determine if it would be economically feasible to offer IDR metering to Standard Offer Customers. <p>Exceptions: Some Cooperatives (i.e. Trico) may be able to accommodate Issue 100 in the future since they are beginning to install IDR meters.</p> <p>LeeAnn Torkleson (R.W. Beck/CUC) confirmed that CUC will not be able to provide IDR meters for Standard Offer Customers regardless of load. At such time that CUC offers IDR meters to Standard Offer customers, they will look at proposals to accommodate Issue 100.</p> <p>SRP</p> <p>SRP confirmed that they have a one time only fee for Standard Offer customer to request an IDR meter to be installed.</p> <p>Janie Mollon expressed a concern of how this will be documented to ensure that the UDC will not change their minds at a later date.</p>		

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						<p>The group agreed that this issue is closed with the exception of implementation. The group will wait until the draft-metering hand-book is out to determine how Janie's concerns will be addressed.</p> <p>04/04/01</p> <p>LeeAnn (RW BECK/CITIZENS) reported on an action item from the March 21 meeting -- Citizens does not have any IDR meters listed on their accepted meter list at this time that they would be willing to purchase.</p> <p>TEP will confirm if they will waive a meter test charge if the meter had been tested within the time period specified in the rules for meter testing</p> <p>04/18/01</p> <p>TEP confirmed waiving a fee for meter testing if the meter was tested within a given time period.</p> <p>Tony Gillooly said that when a DA customer returns to SO, if the meter is in good shape and has been tested (calibrated) in the last 5 years, the meter would be purchased by TEP without charging a testing fee.</p> <p>This issue has been resolved; all UDCs have processes set up to accommodate this issue.</p>		
101	MRSP performance monitoring and certification		Task Team			<p>2/07/01 Task team was established, chaired by Janie Mollon due date 4/04/01</p> <p>3/7/01 The group reviewed and made recommendation to the status report. Additional task team meetings are required.</p> <p>3/21/01 Janie Mollon (New West Energy) reported that she has received comments back on the Performance document and will be addressing the comments from the March 7, 2001 Policy meeting as well. Janie will have drafts of the requested standard letters available for review by the group at the next Task Team meeting. -- The next meeting will be held at New West Energy on April 12th. An agenda will be sent out confirming the date and time</p> <p>04/04/01</p> <p>Janie Mollon (New West Energy) passed out a "Questions and Answers – Performance Monitoring Report" handout. This docu-</p>		Open

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						<p>ment is a compilation of comments from participants at meetings and e-mails to Janie. It will be used to clarify the issues that need to be covered in the next MRSP performance-monitoring meeting.</p> <p>A concern discussed at this meeting is that MRSP could be compliant regarding the PM, but still be de-certified for some other infractions not covered by the PM.</p> <p>Action Item: What are MRSP de-certification and ESP processes/rules for your company? And does this information belong in the PM document? Present at the MRSP meeting April 12, 2000</p> <p>04/18/01</p> <p>John Wallace reported on the status of the task team. Terms were defined, event, exception, violation, out of compliance. Problems were identified in how to count the various events/violations/exceptions for the PMR. This topic is to be discussed in the next meeting. Draft warning letters were standardized. Minutes and warning letters were sent out 4/18/01 by Mary Ippolito</p> <p>The warning letters going to ESP and MRSP are still a problem. There are some confidentiality issues in revealing the problems of an MRSP in other ESP territories to all other ESP's. Kathy Flood (SRP) requested a legal clarification from ACC legal department on this issue.</p> <p>Janie Mollon proposed monitoring solely by ESP (eliminate the aggregate monitoring), it will not be as complicated to monitor and eliminates the legal ramifications of sending warning letters to all ESP's</p> <p>John Wallace will be the new chair as Janie Mollon has been re-assigned at New West Energy.</p> <p>An action item report from staff regarding to what happens to the letter sent to the director of the utilities division.</p> <p>The letter must state that it is an informal complaint. A person on the utilities director's office staff will handle the issue. If this does not resolve the issue, the formal complaint process must begin.</p>		

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						Action Item: Barbara Keene will contact the Staff legal department for clarification on the right of the UDC to send warning letters to ESP's regarding the performance of their MRSPs in other ESP territories.		
102	Modify 867 to meet VEE rules		Policy			07/20/00 Missing intervals and zero intervals referred to next VEE session.		Open
103	Day of Removal (Day of install issue 41)		Policy			<p>Need to develop a procedure to ensure that when a meter is removed that all data is captured. Develop who is responsible for posting up to what time</p> <p>3/21/01 The group agreed that a separate Task Team is required to develop the Day of Install and Day of Removal Process covering both MSP and MRSP responsibility. The Task Team will make a recommendation on where the process will reside (i.e. VEE doc, Metering Handbook etc). The group agreed to allow the MRSP or MSP Performance Task Team (whoever finishes first) to complete the Performance Monitoring document until they are ready to look at Day of Install/Day of Removal. At that time, the MRSP Performance Task Team will be put on hold while the Day of Install/Day of Removal task Team is established to complete the process. Once this process is complete, the MRSP Performance Task Team will re-group to develop the Performance monitoring criteria around Day of Install/Day of Removal. The MSP Performance Monitoring Task Team will also incorporate into their Performance Monitoring into their document.</p>		Open
104	Develop VEE rules for Non IDR							Open
105	MSP/MRSPs should be allowed to subcontract for services to qualified personnel, without having to make them employees of the company, as long as the certificated MSP/MRSP is still responsible for the work they perform.		Policy			2/07/01 Copied from issue 56 to separate the two issues.		Open

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106	Develop a document showing all agreed upon billing business rules		Task Team		See issue 96			Open
107	Develop a document showing all agreed upon Metering business rules					<p>2/07/01 Task team was established, chaired by Stacy Aguayo due date 3/07/01</p> <p>2/21/01 – The group reviewed a proposed outline for the Metering Handbook</p> <p>3/7/01 The group agreed that the scope of this task has increased substantially. At this time, the Task Team will focus on filling in the sections that pertain only to issues the PSWG has approved and address the other sections later. With this specific focus, the Task Team is aiming to finalize their work by the April 4th meeting.</p> <p>3/21/01 Stacy Aguayo (APS) reported that the team is on task to have a draft of the AZ Metering Handbook ready for the April 4th meeting.</p> <p>04/04/01</p> <p>The Overview: Needs more information and detail regarding document purpose and how to read the document. Comments appreciated.</p> <p>Ch 1 and 2: This general information was never discussed in PSWG or other AZ meetings. This is a compilation from other utilities (out of state) as well as in-state processes. Comments appreciated.</p> <p>It was suggested moving the metering forms document approved by PSWG and currently posted on the ACC website into the metering handbook so ESP/MSP have a single place to look.</p> <p>Action Item: Participants need to review and redline the document. Send comments to Stacy Aguayo by April 18th. A draft incorporating all the comments will be presented by May 2nd, 2001 meeting.</p> <p>04/18/01 Stacy will create a master document of changes showing all substantive changes to text. Comments due no later than May 2nd. Each future meeting will have a two-hour discussion on these changes, beginning May 16th</p>		Open

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						<p>Sections of the Handbook from the Operating Procedures, that cannot have content changes because it is an approved document: (requires using the change control process): Section 2: MSP qualifications, 3.10 Primary metering and 3.4 ANSI standards</p> <p>Comments on the metering form packet from Staff: Two UDCs are missing: Aho Improvement Company, Morenci Water and Electric (Pgs 5 & 21 data elements). Can these UDCs be listed in this document despite not participating in the formation of the document?</p> <p>Report from Staff on Section 1.6 metering Handbook: This section is redundant from the rules, suggested removing the section details, but reference the State Rules (a general reference, not a specific listing of a rule).</p> <p>Action Item: Barbara will contact the two missing UDCs and advise them of the work of the PSWG and what standards have been developed. She will add them to distribution list so they can become active participants. Status report at May 2 mtg.</p>		
108	Inconsistency involving transmission and ancillary services as non Competitive in definitions (1601 29) and C - Competitive in Billing elements(1612 O) and tariffs (1606 C2) (ACC Staff)					<p>2/21/01 – Staff is requesting the PSWG develop a recommendation on the issue.</p> <p>3/7/01 After much discussion the group agreed that although transmission is listed as a Competitive charge the definitions state that it is non competitive, and the recommendation is not to move transmission to Non Competitive. The intent is that a customer can look at their unbundled bill and see what and see what parts other entities may provide. The group is exploring other <u>future</u> options like changing the titles of Non Competitive and Competitive to something else.</p> <p>3/21/01 Barbara Keene communicated that her report back to the Commission on this issue is due April 10th.</p> <p>With the exception of APS, all participants agreed to removing “Competitive” and Non Competitive from the Billing Element section (R-14-2-1612 O)</p> <p>APS will communicate directly to Barbara Keene their position on this issue by March 26, 2001.</p>		Resv

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						The group agreed that Issue 108 is closed.		
109	New CC&N application needs to be reviewed to verify there are no inconsistencies between what the PSWG has approved. (ACC Staff)					<p>2/21/01 – ACC Staff raised the issue for the group to address Action Item: Ken Grove volunteered to review the MRSP CC&N requirements and report back at the March 7, 2001 meeting. Action Item: Janet Henry volunteered to review the MSP CC&N requirements and report back at the March 7, 2001 meeting.</p> <p>3/7/01 – Jim Wontor reported on suggestion to include items mentioned in the CC&N doc in the approved VEE standards and the performance monitoring doc so the MRSPs have one document that identifies what the expectations are to operate in AZ. The group agreed and passed suggestion to Task Team.</p> <p>Janet will report on MSP CC&N doc at 3/21/01 meeting. 3/21/01 Janet Henry (AXON Field Solutions) reported no inconsistencies in the MSP CC&N requirements and suggested the MSP Performance Task Team look at incorporating the requirements into the Performance document.</p> <p>The group agreed to assign the review of the document regarding certifying workers to classification and how this is going to be accomplished. Janet will highlight the document areas that need to be considered in this review.</p>		Open
110	What is the process to ensure that all meter data is in before the account goes back to bundled service?					<p>2/21/01 (From Metering Business Rule doc.) How does UDC verify with the ESP that all the data is complete? If data is incomplete how does UDC notify ESP? (data from a previous billing cycle not final bill data). This is being referred to VEE as of 9/27/00 but left here to make sure it is covered and does not need to be part of the Bus Rule Doc.</p>		Open
111	SRP raised the issue of changing the AZ 810 to show the read field as Conditional rather than Mandatory		Policy			<p>3/7/01 – The majority of the group agreed to make the change. Gene Schlecta (SRP) will make the change and send it out for review and will be discussed at the March 21st meeting.</p>		Open

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						<p>3/21/01 The group agreed that this field is Conditional since a read is only required to be on the bill for Residential customers and not required for Commercial. SRP' has an issue with this since they do not show reads for interval metered customers regardless if it's a Commercial or Residential customer. Gene Slechta will take this back to SRP to re-look at the issue before the group agrees to approve changing the meter read field to Conditional from Mandatory.</p> <p>04/04/01 Gene Slechta (SRP) reported that SRP' billing system does not have the capability of providing beginning and ending reads on the 810. SRP commented that the ESP can calculate the beginning and ending reads from the 867 billing data for residential IDR customers. The field will be populated if the UDC can provide the reads.</p> <p>Action Item:</p> <p>All participants review the options and be prepared with response for May 2nd.</p> <p>Should this field be conditional or optional? Further discussion is needed at the May 2nd meeting. Discuss the options below:</p> <p>The three options discussed regarding the requirement for sending beginning and ending reads for Residential IDR customers:</p> <ol style="list-style-type: none"> 1. Let the state process drive the requirement 2. Let the market drive the requirement (between ESP/MRSP) 3. Obtain a waiver or have the commission change the rules requiring printing the beginning and end reads for Residential IDR customers <p>Action item:</p> <p>Gene and Shirley will review 810 documents for conditional field definitions and make recommendations as needed.</p>		
112	Develop a master list of all acceptable meters within each UDC territory		Policy			3/21/01 Raised by Navopache		Open

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113	Do the performance standards created for MRSPs and MSPs apply to the UDCs?	04/18/01	MSP			04/18/01 Issue raised by Janet Henry (AXON FS) at MSP meeting		Open
114	What are (are there) state the timing requirements for meter testing?	04/18/01	Policy			04/18/01 PSWG Policy		
115	How will kVAR meters be removed when both kVAR and kWh meters are present at a site and an MSP installs a single meter that can read both kVAR and kWh?	04/18/01	Policy			04/18/01 PSWG Policy		
116	On incoming DASR – only kWh meter number is required. State DASR handbook does not accommodate totalized meter, and metered – un-metered account combinations	05/02/01	Policy			05/02/01 Policy		
117	If after receiving an RQ DASR and UDC is planning to disconnect for non-payment or turn off a customer AFTER the switch, what is process to notify ESP that customer will be disconnected. (PSWG – Billing)	05/02/01	Policy			05/02/01 Policy		
118	ESP Performance Monitoring is as important as MSP/MRSP performance monitoring and would like to see it addressed (Citizens).	06/06/01	Policy					
119	Reading the rules R14-2-1612C, it seems to indicate that the ESP is held to a	06/06/01	Policy					

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	higher standard since it appears they must report self-slamming. Is this true? (Citizens)							
120	Which DASR should be used for force close? (Citizens)	06/06/01	Policy			06/06/01 Citizens suggests using the TS DASR.		
121	Which DASR should be used for disconnect for non-payment situation? (Citizens)	06/06/01	Policy			06/06/01 Citizens suggests using the TS DASR		
122	Which DASR should be used when the ESP is de-certified. (TEP)	06/06/01	Policy					
123	Citizens CIS system requires a meter number on accepting the TS DASR, but this DASR doesn't have the meter number as a requirement. What changes can be made to accommodate this.	06/06/01	Policy			06/06/01 Suggestion is to add "conditional" to the header, add the meter number as a conditional field to the TS DASR.		